

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

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Agency Profile & Strategic Direction

Agency Mission Statement:

Our mission is to serve the public by administering the tax laws of the Commonwealth of Virginia with integrity, efficiency, and consistency.

Agency IT Vision Statement:

TAX's IT vision is directly derived from the agency vision, as the single purpose of technology at TAX is to enable business objectives. The agency's IT vision is to provide the tools, technology and processes that will enable the agency to achieve business success.

This vision includes four key elements:

- Maximize the agency's operational efficiency and effectiveness by improving productivity, enabling innovation, ensuring collaboration among TAX's business units, providing increased technological capabilities to support business processes, improving voluntary compliance, and ensuring the agency has adequate resources to achieve its mission.
- Achieve a culture based on TAX's core values by creating and maintaining a positive organization climate and improving the quality of job performance.
- Develop, attract, and retain a capable, motivated, and diverse workforce by increasing employee satisfaction, increasing knowledge and skills, and enhancing communication.
- Ensure customer satisfaction by improving service quality, reducing burden of compliance, improving customer education, and improving support to external stakeholders.

Our future IT environment will provide the necessary applications systems, technical infrastructure, tools, and processes to support the following:

- To provide taxpayers with self-service, efficient, easy-to-use, friendly tools that will enable them to file and pay taxes over the Internet, over the phone, electronically, or on paper.
- To provide taxpayers with easy-to-access information regarding tax policy and compliance.
- To efficiently and accurately process paper and electronically filed taxes and returns.
- To effectively collect delinquent taxes by applying fair and effective enforcement measures.
- To effectively identify non-compliant taxpayers, detect fraudulent taxpayers, report and track audit cases.
- To provide Customer Service Reps with an abundant amount of information and tools to assist taxpayers with questions and inquiries, and education.
- To increase the use of data partnering with other state agencies, localities, and private companies for registering taxpayers, obtaining information, and identifying non-compliant taxpayers.
- To reduce dependency on paper processes throughout the agency. More information stored and retrieved through electronic means.
- To provide enhanced communication systems for both employees and taxpayers.
- To provide fast, reliable, and secure technology that can provide employees and taxpayers access to systems, tools and services.
- To deliver quality data and methods for tax analysis and forecasting.
- To provide accurate economic and revenue forecasts in a timely manner.
- To provide and maintain administrative systems to efficiently and effectively manage the agency.
- To provide security for all agency electronic systems including confidential taxpayer data and all databases or other electronic information.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Total Employees: 809

Total IT Employees: 108

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Project Selection Criteria:

Over the last five years, TAX's IT investment management approach has been driven largely by the Partnership Project and legislative mandates.

TAX and AMS began the Partnership Project in July 1998. The contract was structured to include an examination of all business processes, and the introduction of appropriate technologies to ensure business success. The project plan included those initiatives that had clear and critical business drivers, and constituted a five-year plan for achieving business success. This business process change plan has been our primary guide for technology initiatives over the past five years, and will continue to provide direction until conclusion of the project.

The other source of technology system modifications has been legislated mandates. As the state's revenue agency, TAX must update our technology systems at least annually to enact the mandates passed by the General Assembly. While these changes may only involve changes to existing applications systems, they can also include major projects or the development of new systems. The size and complexity of required changes varies from year to year.

Business Case Development:

As part of the Partnership project efforts, TAX developed a strategic planning process that would help ensure a continued focus on key business priorities and objectives. The strategic planning team is comprised of both operational (functional) staff as well as technology staff. Once key business objectives are identified and action plans developed, the strategic planning team looks for opportunities to leverage existing or new technology to enable business success. With limited resources, it is more critical now than ever for technology staff to be focused on the most critical agency business priorities, as only critical priorities can be funded. Once a critical process is identified for revision and possible automation, whether through the legislative process or our own strategic planning process, TAX staff analyze the benefits and cost of automation. The business of a state revenue agency requires processing of millions of documents and checks each year, and responding to hundreds of thousands of customer contacts. In many cases, automation is not a luxury but rather is essential to our ability to meet our customer's expectations within our budget and staffing constraints.

Risk Assessment Methodologies:

Risk identification and mitigation is a formal component of the Partnership Project. Risks are identified at the team level as well as the project level, and documented along with mitigation strategies in a Lotus Notes Application. Risks are reviewed with the appropriate level of management on a regular basis to ensure that mitigation strategies are being effective.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Prioritization Schema:

Once it is determined that it is appropriate to invest IT dollars, technology staff work closely with staff from the operating areas to determine the requirements, alternative solutions, cost and potential benefits. Projects that are not mandated are prioritized by an executive steering committee based on those projects that provide the greatest value for the agency as a whole.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Core Business Activities:

Core Business Activity Title	Core Business Activity Description	Core Business Activity Sub-Function Title	Core Business Activity Sub-Function Description
EXECUTIVE MANAGEMENT	Efforts to assist the Governor in statewide management of state activities.	Planning, Budgeting, and Evaluation Services	Efforts to provide staff assistance and support to the Governor, the Secretaries, and other officials so that services are rendered in an effective and efficient manner.
GENERAL SERVICES	Efforts to provide administrative and logistical support to state, regional and local agencies.	Revenue Administration Services	Efforts to control and collect revenues and to disburse state funds.
GENERAL SERVICES	Efforts to provide administrative and logistical support to state, regional and local agencies.	Tax Value Assistance to Localities	Efforts to promote tax equalization and to provide reevaluation of real estate and personal properties.
GENERAL SERVICES	Efforts to provide administrative and logistical support to state, regional and local agencies.	Public/ Private Partnership	Efforts to improve the delivery of government services through the establishment of public/ private partnerships.
GENERAL SERVICES	Efforts to provide administrative and logistical support to state, regional and local agencies.	Administrative and Support Services	Efforts to provide overall administrative and logistical support services.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Key Customers Associated With Each Core Business Activity :

Core Business Activity Title	Core Business Activity Description	Core Business Activity Sub-Function Title	Core Business Activity Sub-Function Description
EXECUTIVE MANAGEMENT	Efforts to assist the Governor in statewide management of state activities.	Planning, Budgeting, and Evaluation Services	Efforts to provide staff assistance and support to the Governor, the Secretaries, and other officials so that services are rendered in an effective and efficient manner.
Key Customers Governor's Office			
GENERAL SERVICES	Efforts to provide administrative and logistical support to state, regional and local agencies.	Revenue Administration Services	Efforts to control and collect revenues and to disburse state funds.
Key Customers Attorney General's Office Citizens/Taxpayers of the Commonwealth Federal Government General Assembly Governor's Office IRS/Professional Associations Local Governments Management and Employees State Government			
GENERAL SERVICES	Efforts to provide administrative and logistical support to state, regional and local agencies.	Tax Value Assistance to Localities	Efforts to promote tax equalization and to provide reevaluation of real estate and personal properties.
Key Customers Local Governments			
GENERAL SERVICES	Efforts to provide administrative and logistical support to state, regional and local agencies.	Public/ Private Partnership	Efforts to improve the delivery of government services through the establishment of public/private partnerships.
Key Customers Citizens/Taxpayers of the Commonwealth Local Governments			

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Management and Employees State Government			
GENERAL SERVICES	Efforts to provide administrative and logistical support to state, regional and local agencies.	Administrative and Support Services	Efforts to provide overall administrative and logistical support services.
Key Customers			
Citizens/Taxpayers of the Commonwealth			
General Assembly			
Governor's Office			
Local Governments			
Management and Employees			
State Government			

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Key Activities and Associated Outcomes:

<u>Key Activity</u>	<u>Associated Outcome</u>
Applications Development: to leverage technology systems to enable TAX's business objectives and priorities. Develop, enhance and maintain software applications as the result of the Partnership Project.	Develop and maintain new application systems which provide for accurate processing of taxpayer information and offer new capabilities to TAX.
Applications Maintenance: to cost effectively maintain (including annual legislative changes), develop, and operate many of TAX's production systems.	Develop and maintain production application systems that provide for accurate processing of taxpayer information.
Audit: Manages several audit programs designed to ensure compliance with the tax laws.	<p>Continue implementation of the Compliance Initiative funded by the 2003 General Assembly.</p> <p>Continue implementation of the Personal Property Tax Relief Act of 1998 (PPTRA) Compliance Program.</p> <p>Continue implementation of Vendor Registration Legislation (requires nonresident vendors who contract to sell goods to state agencies to register for collection of sales tax on other sales).</p> <p>Continue to capture W-2 data captured from employer copies of W-2 forms for matching against employee copies.</p> <p>Continue with implementation of new centralized audit selection and case management system.</p> <p>Implement a compliance program to identify and collect income tax owed by individuals on income from Pass-Through-Entities.</p> <p>Increase audit productivity by utilization of new tools -- compliance data repository and the new selection and assignment systems.</p> <p>Increase system access speed for telecommuting auditors.</p>

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Channel Operations: Responsible for processing all tax returns and payments. Detailed activities include remittance processing, refund issuance, electronic filing administration, EFT administration, resolving filing errors, and capturing data from returns, payments and other correspondence.

Collections: Manages several activities to compel the payment of delinquent taxes, the filing of delinquent returns, and the collection of unpaid fines/fees owed to VA courts. Administers a Debt Set-off Program for the state to offset tax refunds/lottery winnings/vendor payments against debts owed.

By the end of the 2004-06 biennium, image all individual returns submitted so that electronic images are available for Customer Service, Collections, Compliance and Error Resolution staff.

Deposits are made by the close of business the day after receipt.

During the biennium, increase annual EFT payment of withholding taxes by 25% over the FY02 base to 232,707.

Increase individual electronic filing by 10% annually.

Issue 90% of current year tax refunds in 12 days or less. Issue 95% of current year tax refunds in 20 days or fewer.

Maintain end of calendar year error return inventory levels of below 10,000 for individual taxes and below 20,000 for business taxes.

Collect Court Debt fines and fees within 2% of the annual unit collection goal.

Collect within 2% of annual compliance target.

Collect within 2% of the annual compliance target for contract collection agencies.

Continue implementation of compliance initiative funded by the 2003 General Assembly.

Implement a totally electronic process between TAX and the claimant agencies for the submission, processing and finalization of claims.

Increase system access speed for telecommuting collectors.

Participate in the Federal Debt Set-Off Program.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Customer Service: handles walk-in, phone call, e-mail, and paper correspondence contact with taxpayers, tax practitioners, localities, and other stakeholders. Administers sales tax exemptions for nonprofit organizations. Provides oversight for Tobacco Tax enforcement.

Effectively manage tax credits to ensure statutory caps are not exceeded and credit administration is equitable.

Implement process for 22,000 nonprofit organizations and 7,700 churches. Annually report the fiscal impact of the sales and use tax exemptions for nonprofit entities to the legislature.

Maintain 80% service level on inbound phone calls while blocking less than 2% of total calls to the Contact Center.

Maintain an average 30-day inventory of customer service correspondence and faxes.

Provide assistance and support to the Attorney General's office to ensure diligent enforcement of NPM statute.

Provide local tax officials and tax practitioners with information on changes in Virginia law. Inform taxpayers about new tax legislation and current tax issues to promote voluntary compliance and reduce taxpayer errors.

Respond to electronic mail and secure messages within 48 hrs of receipt, and index mail within 24 hours of receipt.

Respond to letters to the Governor and Secretary of Finance within 5 business days; legislative inquiries within 7 business days; and highly sensitive letters to Tax Commissioner within 10 business days.

Successfully inform taxpayers to insure accelerated sales tax revenues are timely received under provisions of the law.

Various commodity taxes are provided to the appropriate activity.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Deputy Commissioner - Local Government Partnerships: Develop and oversee several pilot programs with local Treasurers and Commissioners of Revenue (delinquent tax collection, Meals tax audit program, Secure Messaging, Cigarette Tax Stamp, BPOL data).

Estimates the reimbursements to localities under the Personal Property Tax Relief Act.

Fiscal Office: Budget Administration, Revenue Accounting, and Accounts Payable Accounting.

Allow TAX to close tax accounts of businesses that are no longer in service.

Allow TAX to focus resources on collecting active accounts.

Continue taxpayer service that was previously offered through the District Office.

Improve compliance.

Improve taxpayer service.

Increase sales tax revenues to Commonwealth and localities.

Increase tax revenues.

Perform additional audits using existing resources.

Provide direct meeting with TAX collector for discussing tax accounts.

Reduce reliance on out of state collection agencies.

Reduce telephone call volume.

Car tax forecast adopted in November 2002 accurate within 2 percent.

A satisfactory or better audit review by DOA.

Comply with 24 hour/next day deposit of revenues rule.

Comply with all DOA requirements including the Prompt Pay Act.

Include of needed funding in submissions made by Governor to the General Assembly.

Receive Satisfactory audit by APA.

Receive Satisfactory audit findings by APA and internal auditors.

Satisfy internal and external customers (as measured by their acceptance of reported financial information).

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Fiscal Office: Budget Administration,
Revenue Accounting, and Accounts
Payable Accounting.

Human Resources: Recruitment/Hiring,
Compensation, Benefits, Leave Admin.,
Administer Recognition Programs,
Performance Management, Dispute
Resolution, Physical Security Access,
Workforce Development.

Successfully complete each financial
year
(no deficits and minimal excess).

Successfully meet all required data
submission deadlines imposed by DPB.

Accurately tracks leave to ensure
compliance with state and federal
policies and procedures.

Accurately update Benefits Eligibility
System (BES) and forward changes to
Payroll.

Accurately process Worker's
Compensation claims and ensure leave
is recorded accurately.

Employees and management resolve
issues informally; formal complaints are
kept to an acceptable level.

Employees are able to access locations
at times needed to perform their work.
Terminating employees are unable to
pose a threat to the agency by having
access to the premises.

Employees who are not contributing are
developed or removed timely. Increased
communication between supervisors
and employees equals better
relationships/greater performance.

Job offers made within 60 days of
posting; Ave. cost per/hire is within
acceptable standard; % Employees
removed during probation <5%
annually; Employment practices are
viewed as fair;

New employees have a good basic
introduction to the agency; Hiring
practices ensure a diverse workforce.

Pay practices flexibilities are used
effectively to ensure that critical
employees are retained. 95% of special
payments are made by the next payday
following request. Compensation
practices are viewed as fair (minimal
challenges to pay practices).

Provides support to ensure that agency
recognition program is utilized
effectively.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Human Resources: Recruitment/Hiring, Compensation, Benefits, Leave Admin., Administer Recognition Programs, Performance Management, Dispute Resolution, Physical Security Access, Workforce Development.

Internal Audit: Assists TAX in accomplishing its objectives by bringing a systematic, disciplined approach to evaluate and improve the effectiveness of risk management, control, and governance processes.

Mapping Services: provides original or revised cadastral (tax value) maps to localities and conducts a school designed to instruct assessors and their staff on making property transfers to cadastral maps.

Operations Support: Manages incoming and outgoing mail operations. Manages inventory management of a wide array of forms and envelopes used in tax operations.

Partnership Project-Amnesty: This portion of the Partnership Technology Fund is utilized to fund the Tax Amnesty program that will be implemented in the Fall of 2003.

Partnership Project-TAX share of Technology Fund: This portion is utilized to support TAX operating expenses incurred as a result of Partnership initiatives and has enabled TAX to absorb the cost of supporting a series of major IT program.

The agency's employees are fully competent to accomplish the work they are assigned, and the agency has a cadre of employees prepared to step into critical roles to succeed retiring employees.

Authentication of allegations of employee fraud, waste, and abuse and short and long-term recommendations to address instances with merit.

Improve agency operational efficiency, effectiveness, controls, risk management, and specific identification of opportunities where revenues can be increased and costs reduced.

Relevant and timely recommendations resulting in the successful implementation of the Partnership Project initiatives and systems.

Timely and non-disruptive annual independent audits.

Provide localities with accurate updated maps critical to maintaining their real estate tax base.

Deliver tax returns and payments to the appropriate offices three to four times each day driven by incoming mail volumes.

Ensure timely issuance of requested supplies, documents and forms to internal and external customers.

Produce additional state and local compliance revenue.

Maintain existing operations and service levels while simultaneously implementing the Partnership Project.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Policy Development/Appeals and Rulings: Resolves taxpayer protests, resolves local BPOL issues, provides advisory opinions, provides litigation support, provides legislative analysis, develops regulations, oversees agency legislative process, & provides executive and legislative staff support.

Analyze enacted federal tax law changes on a continuing basis to determine the revenue impact of such changes should Virginia decide to adopt them.

Develop a process to use this information to identify emerging issues in state taxation and to proactively address these issues through legislation, regulations or other means in order to minimize controversies with taxpayers.

Devise and implement a plan to revise TAX's regulations. Priority will be given to revising the sales tax regulations.

Institute process that tracks national tax issues on a monthly basis.

Monitor all federal tax legislation pending in Congress.

Prepare all legislative documents in a timely manner with a high degree of accuracy.

Prepare and publish studies in a timely and accurate manner.

Prepare required documents for agency legislative package.

Propose legislation as appropriate.

Provide assistance as needed by suggesting legal strategy, providing research, and in the production of documents.

Provide significant support to the Executive branch in revising Virginia's tax code and the Streamlined Sales Tax Project.

Provide staff support to legislative studies as required or requested.

Reduce reliance on Appeals and Rulings for legislative process.

Reduce support to legislative process.

Repeal current regulation for Va. Code § 58.1-446 in order to close corporate loopholes.

Resolve appeals as information is received from taxpayers.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Prepares the forecast of the VA economy, General Fund, and Transportation Fund revenue estimates. Prepares/distributes forecasting publications. Estimates all Appropriation Act line items that directly relate to the revenue forecast. Tracks collections of revenues and prepares monthly reports.

Property Tax Appraisal & Classification: provide advisory aid & assistance to localities in property valuation & assessment, provide training in assessment admin. & equalization, provide policy interpretations regarding property tax laws, and administer the statewide assessment/sales ratio study.

Public Relations: Responsible for handling all agency related internal and external Communications.

Respond in a timely and accurate manner to requests for advisory opinions.

Respond to 75% of local tax cases within 120 days.

Respond to 75% of sales tax and individual income tax cases within 120 days.

Respond to ruling requests timely and accurately.

Support Executive Branch initiatives including any tax initiatives the Governor may want to pursue.

Final forecast accurate within 2 percent and 18 month forecast accurate within 4 percent.

Conduct Basic Assessor training in four to five locations throughout the state annually. Conduct Advanced Assessor training annually at the University of Virginia. Conduct training for members of Boards of Equalization and Boards of Assessors.

Implement 2003 legislation mandating additional training for boards of equalization and develop report by October, 2006, regarding the impact of this legislation.

Develop and implement Communication Plans.

Develop employee recognition logos, invitations, posters and bulletin board materials.

Ensures notification of media and receipt of press materials.

Issues news releases; Daily Media Report.

Maintain speaker's schedule and obtain appropriate speakers for audience.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Public Relations: Responsible for handling all agency related internal and external Communications.

Market and promote iFile, Form 760, ELF, Telefile, TV through public service announcements, radio spots, newspapers advertisements, articles for business newsletters, and other tax related newsletters.

Provide up to date information via e-mail and TAX website links.

Publish agency newsletter VISION.

Publish Issues/Media Alert.

Publish TAX Facts Booklet, Annual Report.

Voice of the Customer Forum.

Purchasing and Facilities Management: Procure goods and services for the agency and ensuring vendors meet the specified terms and conditions. Secure and maintain agency facilities including lease space negotiations and renovation management.

Accurately administer outsourced contracts for all services and contractors such as major systems preventative maintenance, security, janitorial services, and fire and security services.

Contract specifications, bids solicitation and evaluation of proposals, and contracts for goods, equipment, and nonprofessional services are accurate and timely.

Ensure that contracts are in compliance with the Virginia Public Procurement Act and state procurement procedures.

Provide building services infrastructure such as HVAC, electrical and plumbing.

Provide facility cleaning and maintenance, building fire alarm/ protection and security.

Provide space design and build out services timely and accurately.

Properly assess railroads, pipelines and rolling stock.

Railroad and Pipeline Appraisal: Render final determinations of railroad property as operating versus non-operating. Assess the real & tangible personal property belonging to railroads & interstate transmission pipeline companies & rail cars belonging to freight car line companies.

Responsible for preparing a 6-year forecast of the Commonwealth's transportation revenues based on approved economic forecasts.

Final forecast accurate within 2 percent and 18 month forecast accurate within 4 percent.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

TAX and American Management Systems (AMS) are engaged in a six-year partnership to perform a comprehensive reengineering initiative that enables TAX to improve operating efficiency and deliver better service to its customers.

Technology Support: responsible for managing the technical infrastructure systems and support services including Security Admin, Configuration Mgmt., Q/A, LAN/WAN, Telephony Integration, Help Desk/Desktop Support, Computer Ops, Database Admin., Unix Admin., Lotus Notes Admin., & Asset Management.

Realize additional customer services and operating efficiencies when the final implementations occur in Summer 2004.

Complete Production output timely and accurately.

Continue to provide agency and the public with accurate, timely, information through the Lotus Notes TAX Policy Library.

Ensure a minimum of 99% availability to all production systems during business hours.

Ensure acceptable performance, security, and accessibility of all database resources.

Ensure acceptable performance, security, and accessibility to Imaging environment (Unix servers, Filenet, Osars).

Ensure accountability of all IT assets.

Ensure all electrical needs meet agency standards.

Ensure all production correspondence is printed and inserted accurately, timely, and according to USPS requirements.

Ensure compliance on all software licenses.

Ensure IT procurements meet agency hardware and software standards and are compatible with existing network devices and other hardware and software in use.

Ensure software changes are successfully migrated from test to production.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Technology Support: responsible for managing the technical infrastructure systems and support services including Security Admin, Configuration Mgmt., Q/A, LAN/WAN, Telephony Integration, Help Desk/Desktop Support, Computer Ops, Database Admin., Unix Admin., Lotus Notes Admin., & Asset Management.

Testing: to ensure and validate that all applications and the modifications to the applications perform as required.

VATAX Online: develop and maintain a full suite of online services for businesses and individual income tax customers.

Ensure that End users are provided meaningful, prompt, efficient service and are satisfied with it.

Ensure that telecommunications services are reliable and provide user with necessary service in timely manner; service response is quick and down times are short.

Ensure the full recovery of any unplanned computing services interruption.

Exploit best practices use of technology tools to increase the efficiency of agency operations.

Maintain latest versions, patches, upgrades, standards, etc. on all production systems.

Provide high-speed connectivity to all TAX employees, from all TAX sites, to all systems and services, using best practices.

Provide secure/controlled IT systems.

Develop and maintain well-tested systems that meet the requirements set forth by TAX.

Develop and maintain robust Internet suite of applications which offer convenience and speed of electronic services to the Commonwealth.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Major IT Projects

Approved for Preliminary Planning — The following project(s) scheduled for initiation in the 2004-2006 Budget Biennium is (are) approved for inclusion in your IT Strategic Plan. A project proposal must be submitted to the CIO before the project(s) will be considered for planning approval. Procurements in support of the project(s) are not approved for submission to the VITA Project Management Division (PMD) for execution until the project has been Approved for Planning by the CIO. For detailed instructions refer to the Interim Procedures for the Initiation and Approval of Major and Non-major Information Technology Projects.

<http://www.vita.virginia.gov/projects/cpm/cpmDocs/projectInitInterimProcs030903.doc>

There are no major projects approved for preliminary planning.

Approved for Planning — The following project(s) scheduled for initiation in the 2004-2006 Budget Biennium is (are) approved for planning. This approval constitutes authorization to undertake the planning necessary to complete a detailed project proposal and project charter for consideration by the Secretariat Oversight Committee and the CIO. Projects "Approved for Planning" must be formally approved for development by the Commonwealth IT Investment Board prior to beginning Phase 3 of the project lifecycle (Project Planning) and execution as defined in the Commonwealth Project Management Guideline. Procurements in support of developing the detailed project proposal and charter are approved for submission to the VITA Project Management Division (PMD) for execution, in accordance with PMD procedures. For detailed instructions refer to the Interim Procedures for the Initiation and Approval of Major and Non-major Information Technology Projects.

<http://www.vita.virginia.gov/projects/cpm/cpmDocs/projectInitInterimProcs030903.doc>

There are no major projects approved for planning.

Active Projects — The following project(s) are(is) scheduled to continue in the 2004-2006 Budget Biennium as an Active Project. All Active Projects must be tracked on the Commonwealth Information Technology Major Projects Dashboard and are subject to monthly review by the CIO. The CIO is authorized to assess progress of all Active Projects and recommend termination of a project to the Commonwealth IT Investment Board.

Project Formal Title	Planned Start Date	Planned Completion Date	Estimate At Completion
Public Private Partnership Project	07/01/1998	07/31/2005	\$31,000,000

Collaboration Opportunity — The following project(s) is (are) designated as a Collaboration Opportunity. Your agency should consult with the other agencies listed on the corresponding collaboration report and evaluate whether collaboration between agencies on these projects is feasible. The results of your collaboration efforts and evaluation should be reported when the project is presented to the Commonwealth IT Investment Board for "Development Approval".

There are no collaboration opportunity projects.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Major IT Procurements

Approved Major IT Procurements - The following major procurements are approved for submission to the VITA Project Management Division (PMD) for execution in accordance with PMD procedures.

Procurement Description	Planned Procurement Delivery Date	Estimated Procurement Cost
IRMS software maintenance	06/30/2005	\$3,000,000
IRMS software maintenance	06/30/2006	\$3,000,000

Disapproved Major IT Procurements - The following major procurements are not approved for submission to the VITA Project Management Division (PMD). The agency should not take any action on the major procurements listed below.

There are no disapproved major procurements.

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Non-major IT Projects

Approved for Planning— The following project(s) scheduled for initiation in the 2004-2006 Budget Biennium is (are) approved for planning. This approval constitutes authorization to undertake the planning necessary to complete a detailed project proposal and project charter for consideration by the CIO. Projects "Approved for Planning" must be formally approved for development by the CIO prior to beginning Phase 3 of the project lifecycle (Project Planning) and execution as defined in the Commonwealth Project Management Guideline. Procurements in support of developing the detailed project proposal and charter are approved for submission to the VITA Project Management Division (PMD) for execution, in accordance with PMD procedures. For detailed instructions refer to the Interim Procedures for the Initiation and Approval of Major and Non-major Information Technology Projects.

<http://www.vita.virginia.gov/projects/cpm/cpmDocs/projectInitInterimProcs030903.doc>

Project Formal Title	Planned Start Date	Planned Completion Date	Estimate At Completion
VATAX Online Enhancements	07/01/2004	06/30/2006	\$500,000.00

Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Non-major IT Procurements

Approved Non-major IT Procurements - The following non-major procurements are approved for submission to the VITA Project Management Division (PMD) for execution in accordance with PMD procedures.

Procurement Description	Planned Procurement Delivery Date	Estimated Procurement Cost
Citrix Advantage software maintenance renewal.	07/01/2004	\$85,000
Citrix Advantage software maintenance renewal.	07/01/2005	\$85,000
Compuware QA Load software maintenance renewal.	07/01/2004	\$74,000
Compuware QA Load software maintenance renewal.	07/01/2005	\$74,000
Datacap software maintenance renewal	07/01/2005	\$72,000
Datacap software maintenance renewal.	07/01/2004	\$72,000
hw/sw maintenance	07	\$165,000
hw/sw maintenance	07/01/2005	\$165,000
Filenet software maintenance renewal	07/01/2004	\$149,000
Filenet software maintenance renewal	07/01/2005	\$149,000
FY05 hardware refreshes - include PC's, laptops, servers, networked printers, high-speed scanners, UPS's and other equipment.	06/30/2005	\$323,300
FY06 hardware refreshes - includes PC's, laptops, servers, printers, high-speed scanners, UPS's and other equipment.	06/30/2006	\$537,700
Genesys software maintenance renewal	07/01/2005	\$61,000
Genesys software maintenance renewal	07/01/04	\$61,000
hardware maintenance (a variety of products)	07/01/2004	\$132,346
hardware maintenance (a variety of products)	07/01/2005	\$132,000
Openview software maintenance	07/01/2004	\$74,000
Openview software maintenance	07/01/2005	\$74,000
Scanners hardware maintenance	07/01/2004	\$125,000
Scanners hardware maintenance	07/01/2005	\$125,000
NCR Remittance Processing hw/sw maintenance	07/01/2004	\$54,000
NCR Remittance Processing hw/sw maintenance	07/01/20	\$54,000
software maintenance	07/01/2004	\$474,231
software maintenance	07/01/2005	\$521,654
Upgrade from version 8.7 to 9i.	06/30/2005	\$936,000
Plasmon OSAR maintenance	07/01/2004	\$91,000
Plasmon OSAR maintenance	07/01/2005	\$91,000
Rockwell hw/sw maintenance	07/01/2004	\$185,000
Rockwell hw/sw maintenance	07/01/2005	\$185,000
Siebel software maintenance	07/01/2005	\$353,000
Siebel software maintenance	07/0	\$353,000
Servers extended maintenance support	07/01/2004	\$102,000
Servers extended maintenance support	07/01/2005	\$102,000



Agency IT Strategic Plan

Secretariat: Finance

Agency Code: 161

Agency: Department of Taxation

Procurement Description	Planned Procurement Delivery Date	Estimated Procurement Cost
	06/30/2005	\$180,000

Servers and equipment.

Disapproved Non-major IT Procurements - The following non-major procurements are not approved for submission to the VITA Project Management Division (PMD). The agency should not take any action on the major procurements listed below.

There are no disapproved non-major procurements.